

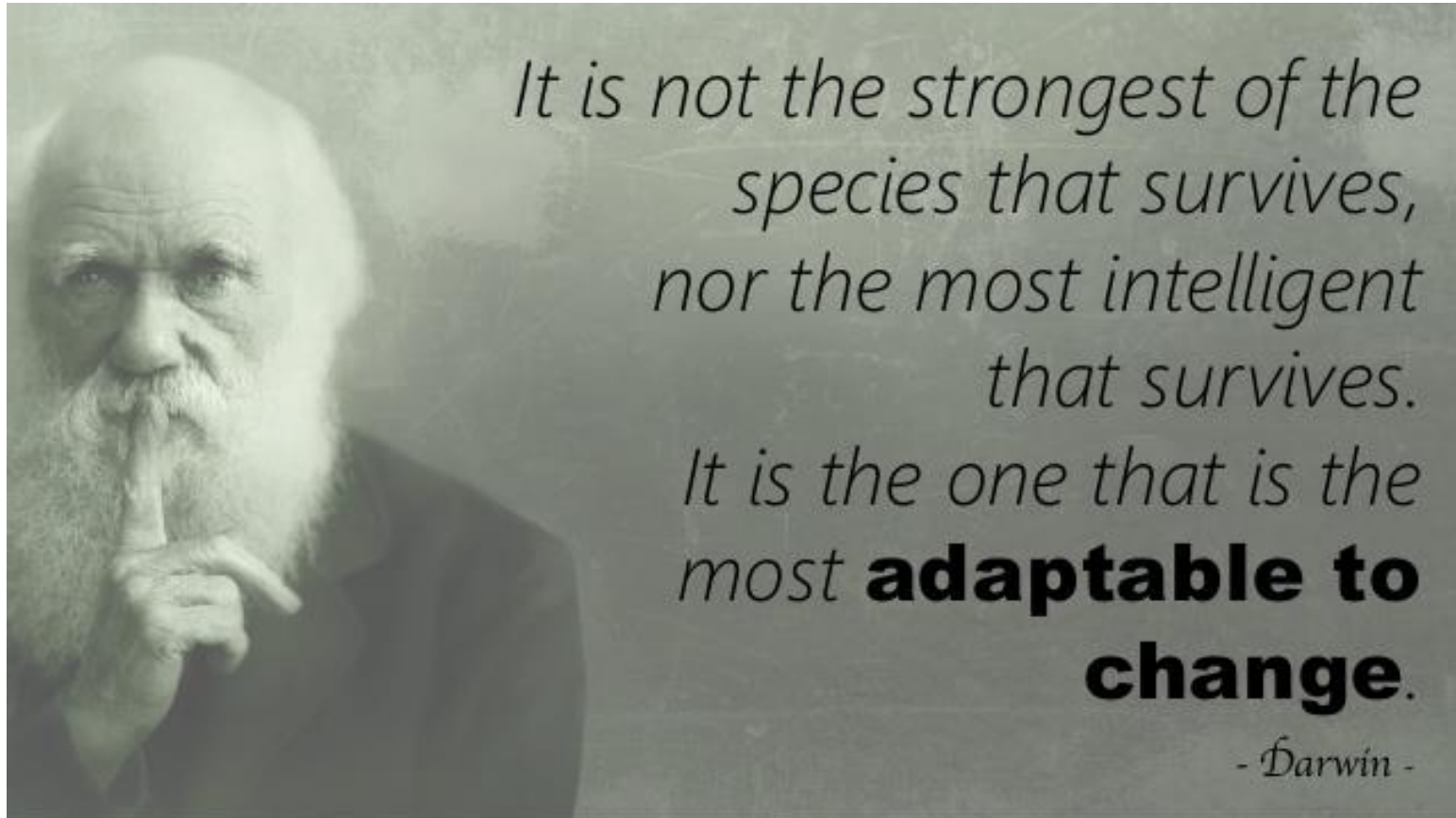


CONSCIOUSLY **CHANGE & GROW**

(change is hard, but not changing is fatal)

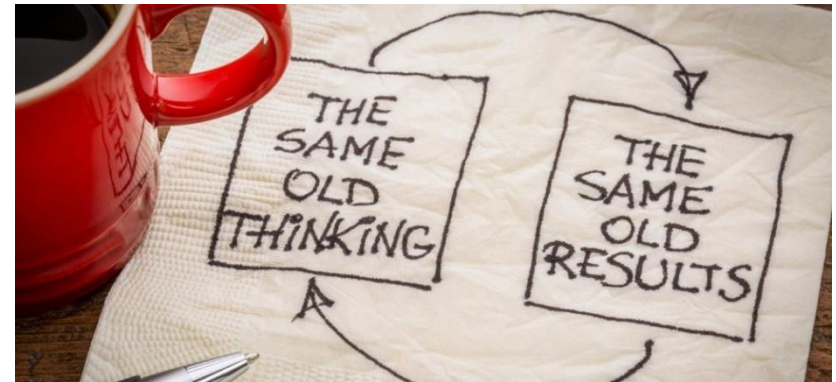
**ORGANIZATIONAL
TRANSFORMATION**

BUSINESS IS DARWINIAN



CHANGE IS HARD, NOT CHANGING IS FATAL

- **Succession/Transition** – how do you **MExit™** & maximize the value of your exit?
- **Hyper-Growth/Scaling** – at risk of failing in a sea of opportunity
- **Stagnant** – no growth
- **Not profitable** – unsustainable
- **Unable to Attract Investment** to grow in an ESG* world
- **High Risk** - Unsure of how to cope with disruptive market changes
- Struggling to **Attract, develop & retain** the best people
- **Fractured Culture** – silos, me vs. we, no synergy between people, teams & clients



• [Environment, Social, Governance](#)

TAKING IT TO THE NEXT LEVEL



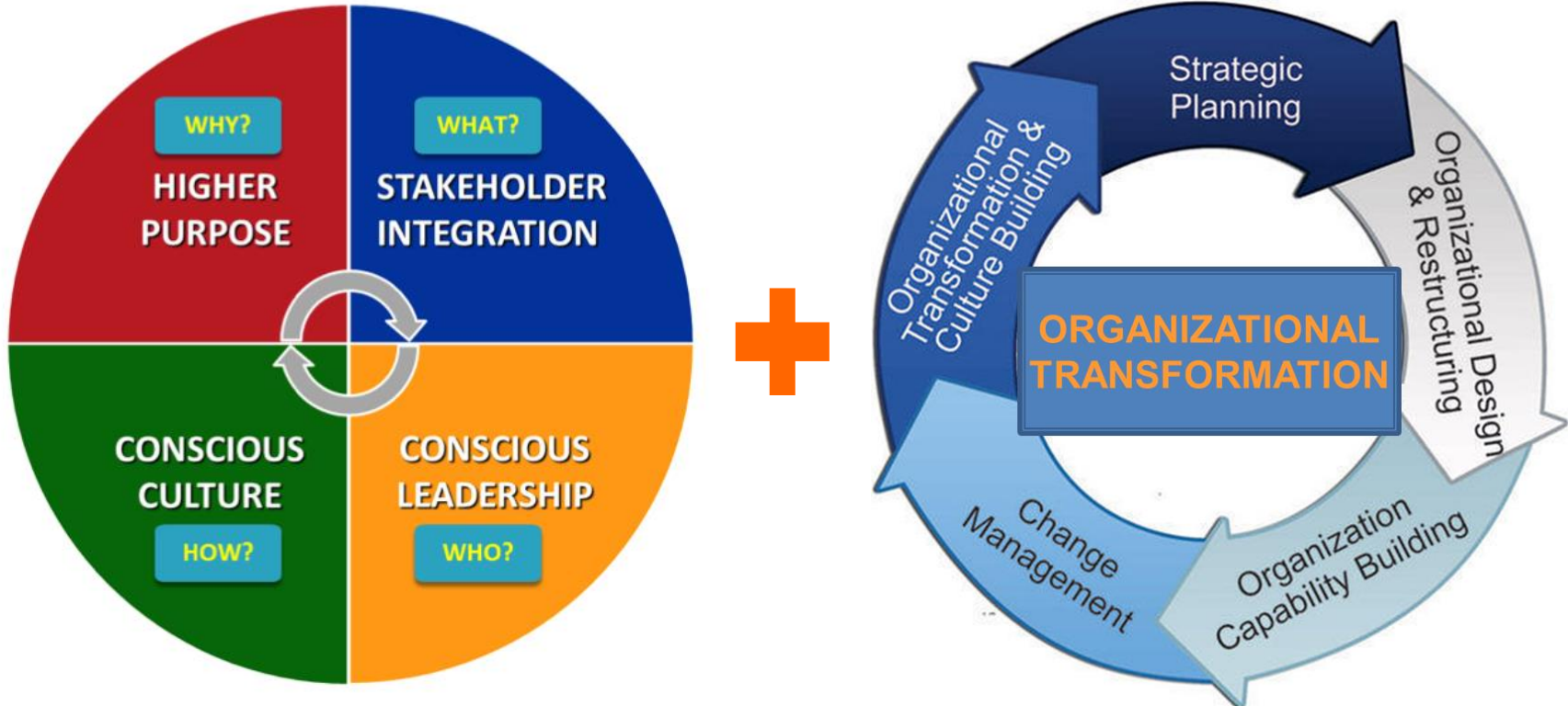
CONSCIOUSLY CHANGE & GROW

- **Grow Exit Value / Succession** – plan to [MExit™](#), maximize the value of your exit
- **Grow Revenue / Scale** – 85% of clients/staff/investors make choices based on Core Values
- **Grow Profitability** – operational excellence
- **Grow Talent** – Attract, retain & engage the best people
- **Attract Investment** – investors buy into conscious (ESG) businesses
- **Grow Adaptability (AQ)** – future-proof your organization = adaptable, agile & innovative
- **Grow Culture** – live & celebrate the conscious/ESG vision / values
- **Grow Accountability** – for breakthrough results



TRANSFORMATION FRAMEWORK

**ESG Conscious Philosophy + Agile Organizational Transformation Process
= An ESG Conscious Business**



BUSINESS IS EVOLVING

The Future of Business is ESG Conscious:

- **BUSINESS 1.0 – Traditional** (shareholder/profit driven)
- **BUSINESS 2.0 – Technological** (digital economy, AI, VR, AR, SaaS, robotics, freemium...)
- **BUSINESS 3.0 – ESG* Conscious** (purpose & stakeholder driven, ESG = Conscious/Sustainable Performance)

* Environment, Social, Governance

WHY AN ESG CONSCIOUS BUSINESS?

ESG Investors want it...

- No ESG, No Money
- >\$40 Trillion in ESG funds 2021
- Market Value Creation = 9-10x*
- ESG is a Measure of conscious / sustainable performance
- SEC ESG Warning



• [*HBR Conscious Capitalism... Perform 10x Better](#)

WHY AN ESG CONSCIOUS BUSINESS?

Clients want it...

- No ESG, Less Value
- All will require ESG from suppliers
- Reason to Switch
- Alignment – Loyalty
- Premium Price



WHY AN ESG CONSCIOUS BUSINESS?

Future Talent wants it...

- Attract
- Retain
- Engage the Best New Talent



[*Conscious Capitalism Association](#)

[*IBJ - A Case of Conscious Capitalism: 9x based on Brain Science](#)

WHY AN ESG CONSCIOUS BUSINESS?

Society wants it...

- Social License to Operate
- UN Sustainability Priorities
- Davos Thought Leadership
- Next Generation's Values



ESG CONSCIOUS BUSINESS LEADERS



MORE THAN JUST WORDS

LIVING ESG:

- Serves all stakeholders
- Ecosystem approach
- Focuses on impact maximization
- Incorporates higher purpose & caring culture
- Reconciles caring and profitability
- Views business as a complex, adaptive system
- Shared vision & common will
- Learns from the past, envisions the future
- Greater stakeholder awareness & participation

ESG AS PR:

- Views ESG as a trade off between profit & social good
- Independent of corporate purpose or culture
- Adds an ethical burden to business
- Often grafted onto traditional business model, usually a separate department or part of public/investor relations
- Sees limited overlap between business & society

STAKEHOLDERS



CREATING WIN-WIN-WIN SOLUTIONS FOR ALL YOUR STAKEHOLDERS



3 KEY VALUE FUNCTIONS



3 KEY VALUE MAXIMIZERS

GET - Increase Future Value Potential

- Increase Mkt Share
- Recurring Revenue
- New Tech
- New Products
- New Markets
- New IP

DELIVER - Increase Profitability

- Operational Excellence
- Increase Quality, Speed, Efficiency
- Reduce Costs
- Increase Customer Loyalty (NPS)

SUPPORT – Polish It

- Org. Restructure
- Team Building
- Document Best Practices c/w KPIs
- Improve MIS

TAKE TIME (2yrs) TO MAXIMIZE VALUE BEFORE YOU SELL

CONSCIOUS CHANGE & GROWTH

Conscious change & growth doesn't just happen, it is a **conscious transformation** with clear strategic goals, planned action, executed well, with discipline, taking you to the **next level of growth & value** in your business



AGILE TRANSFORMATION PROCESS



STRATEGY

Strategic Planning:

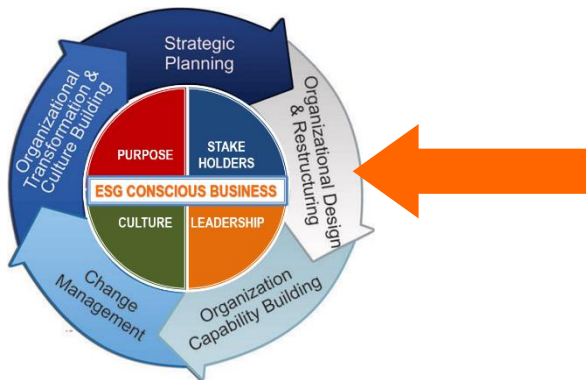
1. ESG Conscious Business Evolution
2. Vision Validation
3. Agile Strategy (Long-term & Sprints)
4. Target Market Strategy
5. “Pulse of the Customer” Research
6. BD Strategy
7. Innovation Strategy
8. Value Cycle MOT Strategy
9. Competitive Analysis
10. Business Environment Analysis
11. Scenario / Risk Management Planning



ORGANIZATION

Organizational Design & Restructuring:

1. Top-grading Talent
2. Performance Management
3. Organizational Design
4. Talent Mapping
5. Role Mapping



CAPACITY BUILDING

Future Leaders Development Program:

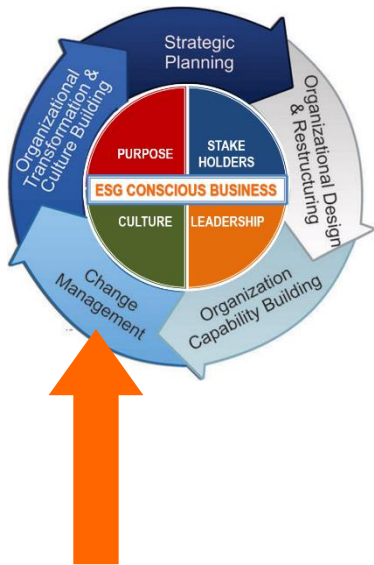
1. Conscious Capitalism
2. 5 Leadership Behaviors
3. A Culture of Accountability
4. Behavioural Profiling/EDISC
5. Building “A” Teams
6. Building & Using KPIs
7. Change Management
8. Coaching for Performance
9. Communications Toolbox
10. Crucial Conversations
11. Getting Things Done
12. Hiring the Right People
13. Indigenous Awareness
14. Innovation
15. Making Yourself Promotable
16. Peer Mentoring
17. Respectful Workplace & Bullying
18. Run Better Meetings
19. Team Problem Solving & Decision making



CHANGE MANAGEMENT

Agile Change Management:

1. 90 Day Sprints
2. Weekly Scrums
3. Team Problem Solving
4. Change Management Training
5. ESG, KPIs & Accountability
6. Performance Management



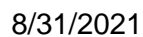
TRANSFORMATION

Organizational Transformation & ESG Conscious Culture Building:

1. Sustain the ESG Conscious Discipline
2. Always lead with “WHY” (Purpose Driven)
3. Live the Core Values Every Day
4. Build a Culture of Accountability
 - i. “Focus on the Wildly Important”
 - ii. Act on the Data (KPIs)
 - iii. Use KPI Scorecards that Motivate
 - iv. Celebrate Success, Don’t Tolerate Mediocrity
5. Continuous Learning & Peer Mentoring



NOT CHANGING IS FATAL!



TAILORED SOLUTION

**Transformation is unique to every team,
requiring more than cookie cutter solutions**

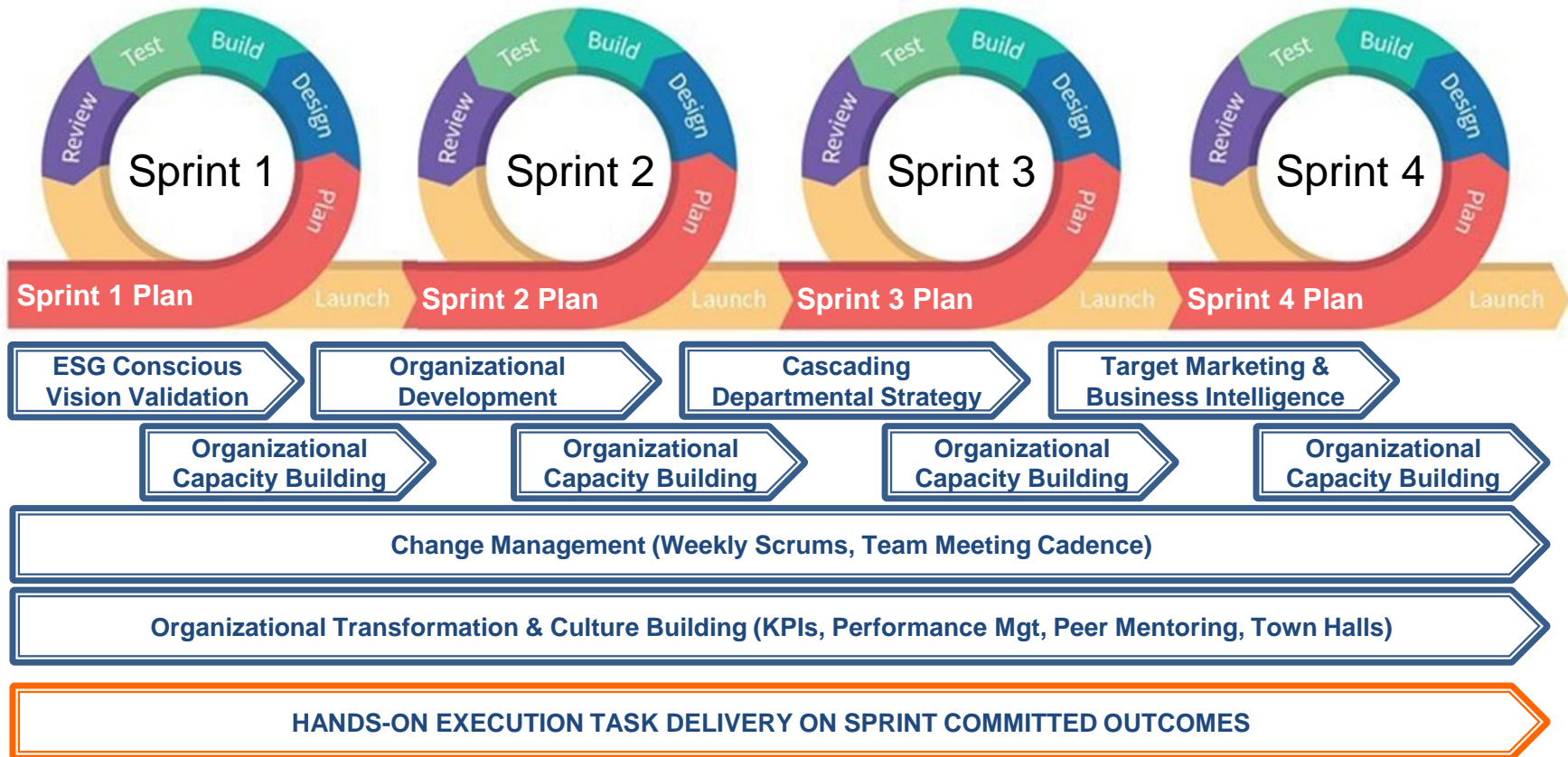


TRANSFORMATION IS A TEAM SPORT

Leaders often feel alone, but making big changes takes a **TEAM**



AGILE EXECUTION



12 Month Cycle

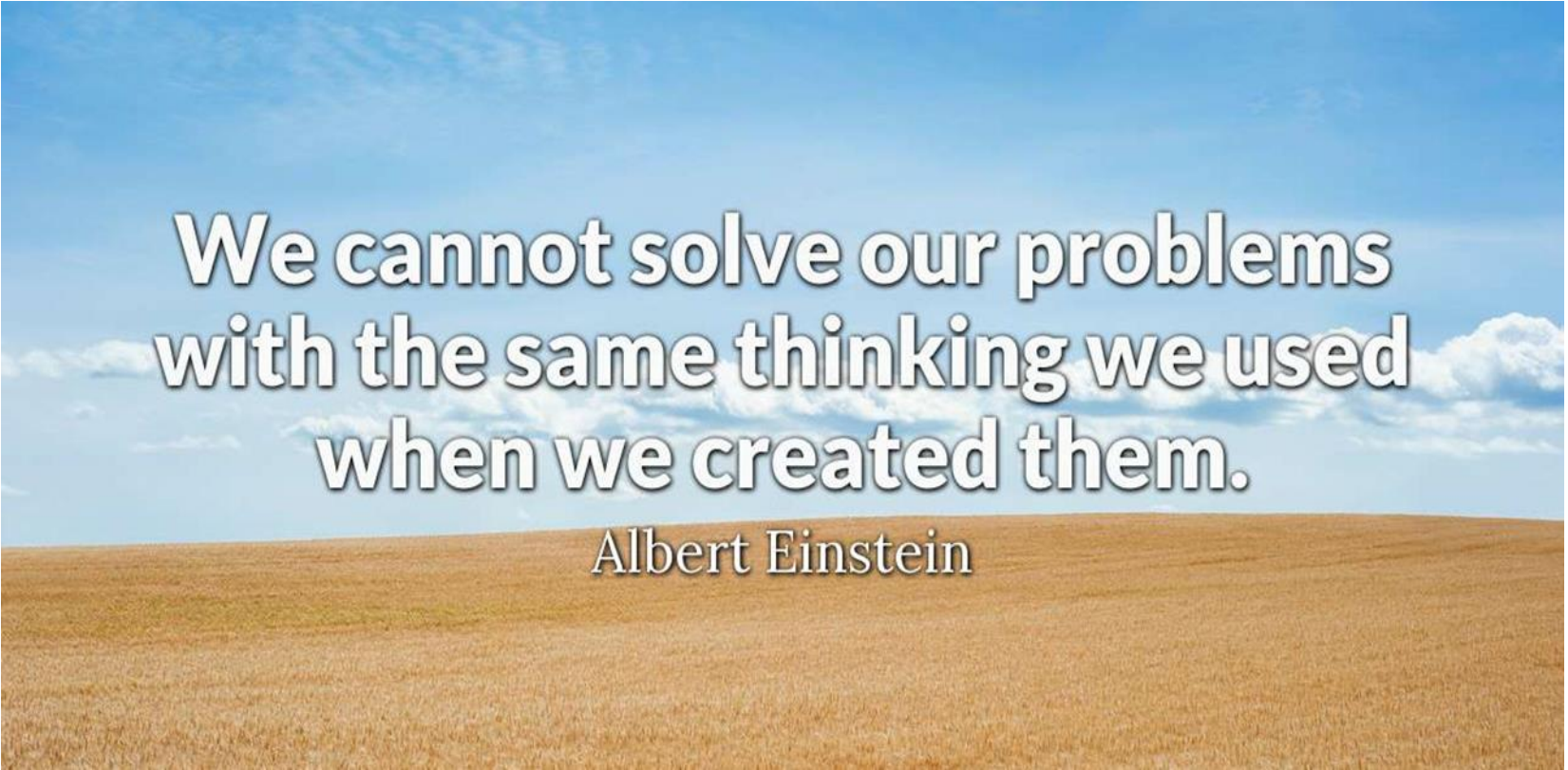
BIG VALUE / SMALL COST

Sample Time Commitment

- | | |
|--|----------------------------|
| 1. ESG Conscious Vision Validation | 1 x 1 day/year |
| 2. Quarterly Sprint / Strategic Change Planning | 4 x 1 day/quarter |
| 3. Organizational Design Workshop | 2 x ½ day |
| 4. Strategy Development &/or Professional Development | 4 x ½ day or 10 x 1.5 hour |
| 5. Weekly Scrum / Team Accountability Check | 42 x 1 hour/week |
| 6. Peer Mentoring Groups | 12 x 1.5 hour/month |
| 7. <u>CEO 1on1</u> | <u>12 x 1 hour/month</u> |



GET OUTSIDE HELP TO CHANGE



**We cannot solve our problems
with the same thinking we used
when we created them.**

Albert Einstein

YOUR CHIEF EVOLUTION OFFICER™

Brad Gaulin, P.Eng., MBA, CEvO



An **organizational transformation executive driving conscious change & growth** by bringing to bear all of my passion, experience, team building, strategy, innovation, development & leadership skills.

- ❑ 35 years evolving as an executive & trusted advisor driving innovation & change
- ❑ 30 years evolving BD/Mktg/Sales in the energy & technology industries
- ❑ 25 years evolving as an entrepreneur (8 startups / 6 M&A)
- ❑ 12 years as an executive team coach & trusted advisor actively transforming conscious companies
- ❑ Peer Mentor & father of 4 millennials/GenZ (evolve or go crazy),



WHY US?

Vision: Enabling organizations to *consciously transform!*

Purpose: Empowering ESG conscious businesses to build a **better world.**

Brand Promise: 10x Value
(*guaranteed or no deal*)

Core Values (TTOP):

- **Tough** Love!
- **Teams** win!
- **Own** it!
- **Positive** impact!

Beyond
Coaching,
Actively
Transforming
Your
Business



NEXT STEPS

1. Current Reality Assessment
2. Executive Workshop - 3hr Team Vision Validation (CEvO sponsored)
3. CEvO Formal Proposal
4. Project Launch





Empowering Organizations to Consciously Transform



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